



FCS 5964-001 Technologies for Financial Planning

The seminar will familiarize students with basic, integrated financial planning tools and software foundational to their completion of FCS 5550 Financial Planning Capstone. Within the context of a basic case study, students will apply foundational time value of money calculations using a financial calculator, and will learn to formulate basic client recommendations through the application of integrated financial planning platforms common to financial planning practice.

This hybrid course will include online course work and 2 on-campus seminars. **Students are required to study the course material through web-based learning activities before the first face-to-face session. Be sure to access CANVAS well before the first meeting!** Grading will depend upon attendance at the two on-campus seminars and completion of assignments during the subsequent two weeks.

Students who have signed up for FCS 5550 are strongly encouraged to take this course. We also welcome all other students in the financial planning courses that have completed at least FCS 3500.